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REVIVALGeopolitics and the ASEAN single aviation market: Aspirations  
versus realitiesHaris Zuan<sup>a\*</sup>, Darren Ellis<sup>a</sup>, Romano Pagliari<sup>a</sup><sup>a</sup>*Cranfield University, Martell House (Building 300), Cranfield MK43 0AL, United Kingdom*

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**Abstract**

This paper aims to explore and identify the key geopolitical barriers and opportunities to greater regional integration amongst the Association of Southeast Asian Nations (ASEAN) member states by examining the case study of the ASEAN single aviation market (ASAM). This paper is based on an ongoing doctoral research project covering the topic. To date, ASEAN has implemented substantial liberalisation of its regional air transport market via an open skies policy, included as part of the ASEAN Community Project. This aims to not just foster connectivity and economic development, but ultimately to contribute to the building of a regional identity. While there has been some evident progress since the launch of the initiative in the region, the open skies agreement promoted as ASAM has not gained as much traction as projected, nor achieved its core stated aim of creating an effective single air transport market; a stated goal it initially planned to achieve by the end of 2015. Most of the literature explaining the divergence between key aspirations and realities in ASAM focuses on the economic regulation of international air transport in the region, and typically discusses these core considerations from the perspectives of law and policy. There are few substantial scholarly works that incorporate geopolitics, aeropolitics and/or diplomacy, all of which are important variables closely linked to the field of international relations. The geopolitical perspective on ASAM is still largely understudied, and this paper and the evolving research underpinning it, are intended to contribute to that identified gap.

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**Keywords:** geopolitics; ASEAN; ASAM; single aviation market; regional multilateralism; ASEAN way

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## 1. Introduction

Although the bilateral system, and the thousands of bilateral air service agreements (ASAs) which underpin it, dominate the global airline industry, multilateralism has managed to make some inroads across several regions over the past few decades. The European single aviation market (SAM) remains the only operational template of effective and comprehensive air market multilateralism to date. Nevertheless, stated aspirations and some progress in Africa, South America and Southeast Asia are evident. On paper, the most successful attempt at air market multilateralism outside Europe is the Multilateral Agreement on the Liberalisation of International Air Transportation (MALIAT); however, signatories are so geographically dispersed from Singapore to Chile to the US that some critics have labelled the agreement “a bridge to nowhere” rather than a road to multilateralism (Knibb, 2015, p. 42).

Even so, these multilateral agreements to liberalise aviation markets in various regions and economic blocs around the world share a few characteristics. Firstly, there are no strong supranational institutions like the European Commission (EC) as in the EU to enforce the agreements; and secondly, all these regions face common aero-political challenges, especially with regards to the granting of more extensive traffic rights – the sixth to ninth freedoms of the air (Tan, 2014a). The one region that does seem closer than any other outside of Europe on the pathway to a single aviation market is Southeast Asia. The ten members of ASEAN remain resolute in their mutual aspiration to mirror Europe’s SAM as much as practical; however, the reality to date has been slow and incomplete. This paper aims to detail and explore the key obstacles and challenges for ASAM from the perspective of geopolitics.

Geopolitics impact the global airline industry in many and varied ways (Debbage, 2014). Although geopolitics is often employed to suggest a tough “approach to the world in general”, it is actually more accurately about “the varied geographies of international relations” (Dodds, 2014, p. 1). Geopolitics help to illuminate the important links between geography and politics, and to ensure that economic industry analyses are performed within a holistic context that involves all key factors and forces shaping and impacting a business, including the airline industry. Additionally, more voices from emerging air markets are required for future research into the global airline industry, and this study aims to contribute in this space. To date, western centric research has dominated the field of air transportation, and this is out of step with industry developments and future industry prospects and evolution (Budd, 2014). A deeper and richer understanding of ASAM requires at the very least an acknowledgement that the so-called “ASEAN way” of consensus building, and flexibility associated with “a preference for informal mechanisms”, mean that sovereignty and not supranational institutions remain central (Dy, 2014, p. 11). Within this context, aeropolitics is used in this paper as a sub-set of geopolitics reflecting the view of Duval (2008) of the latter as “the processes through which, and reasoning behind, nation states develop and implement policy with respect to air access by foreign air carriers” (p. 238).

## 2. ASAM progress so far

According to the *Roadmap for the Economic Elements of the ASAM*, ASEAN member states should either ratify or accept and implement the ASEAN Multilateral Agreement on Air Services (MAAS) and its Protocols 1 to 6 as soon as possible, as the implementation deadline of the MAAS was agreed to be by the end of 2008 for Protocol 5 and by the end of 2010 for Protocol 6. Meanwhile, it was agreed that the ASEAN Multilateral Agreement on the Full Liberalisation of Passenger Air Services (MAFLPAS) should be ratified or accepted by the end of June 2010 for Protocol 1, and by the end of June 2013 for Protocol 2 (ASEAN Secretariat 2021). Table 1 provides the ratification status of these ASEAN agreements across all member countries as of February 2021.

Table 1. Ratification Dates by ASEAN Member States for MAAS and MAFLPAS

Agreement/Protocol	Dates of Signing	Dates of ratification by member states										Date of entry into force
		BNR	CAM	INA	LAO	MAL	MYM	PHI	SIN	THA	VNM	
ASEAN Multilateral Agreement on Air Services	20-5-09	30-3-10	5-5-11	24-11-11	17-3-11	15-12-09	7-8-09	19-4-10	3-7-09	13-10-09	22-12-09	23-11-09
Unlimited Third and Fourth Freedom Traffic	20-5-09	30-3-10	5-5-11	24-11-11	17-3-11	23-1-10	7-8-09	19-4-10	3-7-09	13-10-09	22-12-09	23-11-09
Rights within the ASEAN Sub-Region												
Unlimited Fifth Freedom Traffic Rights within the	20-5-09	30-3-10	5-5-11	24-11-11	17-3-11	23-1-10	7-8-09	19-4-10	3-7-09	13-10-09	22-12-09	In Force

ASEAN Sub-Region													
Protocol 3	Unlimited Third and Fourth Freedom Traffic Rights between the ASEAN Sub-Regions	20-5-09	30-3-10	5-5-11	27-11-12	17-3-11	23-1-10	1-7-11	19-4-10	3-7-09	13-10-09	22-12-09	22-Dec-09
Protocol 4	Unlimited Fifth Freedom Traffic Rights between the ASEAN Sub-Regions	20-5-09	30-3-10	5-5-11	27-11-12	17-3-11	23-1-10	1-7-11	19-4-10	3-7-09	13-10-09	22-12-09	22-12-09
Protocol 5	Unlimited Third and Fourth Freedom Traffic Rights between ASEAN Capital Cities	20-5-09	30-3-10	5-5-11	30-5-14	17-3-11	23-1-10	1-7-11	11-3-16	3-7-09	13-10-09	22-12-09	22-12-09
Protocol 6	Unlimited Fifth Freedom Traffic Rights between ASEAN Capital Cities	20-5-09	30-3-10	5-5-11	30-5-14	17-3-11	23-1-10	1-7-11	11-3-16	3-7-09	13-10-09	22-12-09	22-12-09
<b>ASEAN Multilateral Agreement on the Full Liberalisation of Passenger Air Services</b>		12-11-10	20-2-13	30-7-13	7-4-16	7-4-16	24-4-11	1-7-11	28-3-12	14-3-11	2-9-11	30-9-11	30-6-11
Protocol 1	Unlimited third and fourth freedom traffic rights between any ASEAN cities	12-11-10	20-2-13	30-7-13	7-4-16	7-4-16	24-4-11	1-7-11	28-3-12	14-3-11	2-9-11	4-11-11	1-7-11
Protocol 2	Unlimited fifth freedom traffic rights between any ASEAN cities	12-11-10	20-2-13	30-7-13	7-4-16	7-4-16	24-4-11	1-7-11	28-3-12	14-3-11	2-9-11	4-11-11	1-7-11
Protocol 3	Domestic Code-Share Rights Between Points Within the Territory of any other ASEAN Member States	13-10-17	9-11-20	29-1-21		31-4-20	6-3-19	13-3-19	19-12-19	3-1-19	26-6-19	26-11-18	6-3-19
Protocol 4	Co-Terminal Rights between Points within the Territory of Any Other ASEAN Member State	9-11-18	9-1-20	29-1-21		9-4-20	16-8-19	12-9-19	4-12-19	31-4-19	26-6-19	31-10-19	16-8-19

Country key: BNR: Brunei; CAM: Cambodia; INA: Indonesia; LAO: Laos; MYM: Myanmar; PHI: Philippines; SIN: Singapore; THA: Thailand; VNM: Vietnam.

Source: ASEAN Secretariat (2021)

MAAS and MAFLPAS are fundamental instruments which set out separate liberalisation schedules for capital and non-capital points in the ASEAN territories (Tan, 2014). These two instruments are important in the establishment of the ‘ASEAN community carrier’ concept which allows airlines to be substantially owned and effectively controlled by ASEAN member states (Gootiiz and Mattoo, 2015; Tan, 2009). However, when referring to Table 1, it is clear that each ASEAN member state has implemented the Road Map at a different pace and to varying degrees. A few member states concluded multilateral agreements among themselves to relax market access restrictions without waiting for other members states to do so. In fact, Brunei, Singapore and Thailand adopted limited agreements among themselves in 2004, way ahead of the official timeline set out by the wider bloc (Tan, 2010). But Indonesia – ASEAN’s largest economy and air market – only ratified the agreements in 2016. Somewhat ironically, the capital city of Indonesia, Jakarta, is also the headquarters of the ASEAN Secretariat.

### 3. Scholarly work covering ASAM

Literature on the ASEAN single aviation market (ASAM) acknowledges that its implementation is so far elusive (Dy, 2014), behind schedule (Tan, 2010; Lee, 2019), incomplete (Gootiiz and Mattoo, 2015), inconsistent (Tan, 2013), and reflects a half-hearted attempt (Fox and Ismail, 2017). This is despite an array of literature highlighting the benefits of air transport liberalisation to ASEAN as a regional bloc (Adli Amirullah, 2018; Laplace, Lenoir and Roucolle, 2019; Lee, 2019; Wahjoe, Heniarti and Puspawati, 2019).

#### 3.1. Absence of a supranational regional institution

Most of the key literature on ASAM agree that a central reason for the lack of a single aviation market in ASEAN is the absence of a supranational authority like that in the EU (Dy, 2014). It is important to note that the EU was only able to achieve this advanced single aviation market model because of the effort it focused on creating a broader common economic market by eliminating borders between member states with the establishment of the European

Economic Community (EEC) in 1958 (Lee 2019). In contrast, ASEAN regional economic integration was still in its initial stages when it decided to create a single aviation market (Dy, 2014).

Without such a supranational regional institution to facilitate and oversee the implementation of the blueprint, little in the way of a top-down approach is possible (Tan, 2010, 2013, 2015; Dy, 2014; Fox and Ismail, 2017; Lee, 2019; Surya Putra, 2019; Thomas et al., 2008). This reality was first highlighted in a comprehensive study on ASAM by an aviation expert group, conducted at the request of the ASEAN Secretariat in 2008 (Thomas et al., 2008).

Alan Tan, one of the leading aviation law academics in Asia, and arguably the most prolific academic researcher covering ASEAN aviation, explained that the ASEAN mechanism in implementing ASAM is based on an “incrementalist philosophy...starting with modest goals first and pursuing more ambitious relaxations at a later stage” (Tan, 2013, p.6). ASEAN refers to this slow step-by-step approach as the ‘ASEAN way’, and also characterised by a non-interference and consensus-based decision-making process not limited to just air transport, but across many other sectors too (Acharya, 2012; Bonin, 2012; Fukunaga, 2019; Ishido, 2011; Nguyen, Elms and Lavanya, 2019). Hong Kong-based aviation law expert, Lee Jae Woon echoes Alan Tan, saying that even though the ASEAN integration model is practical, its progress has been slow to date. According to Lee (2019), the gradual approach is inevitable, since there is no supranational institution embedded within ASEAN, and buy-ins from reluctant member states must be gained first (Lee, 2019). As further explained by Lee (2019):

Although the Action Plan has not been implemented according to the suggested timetable, the fact that ASEAN used a concrete action plan to push ahead with regional liberalization was instrumental in achieving meaningful results. All three agreements and their protocols have been ratified by all ten of the ASEAN states (pp.189–190).

### *3.2. Shifting priorities and disjointed efforts*

However, others believe that delays in forging a single aviation market in ASEAN are not predominately structural, but rather are based on the constantly shifting priorities and disjointed efforts by its individual member states (Dy, 2014; Lee, 2015). Dy (2014) pointed out that before completion of the Implementation Framework, a few member states had already begun a series of negotiations on air transport liberalisation with third parties outside ASEAN, which have compromised ASEAN’s centrality in its relationships and cooperation with external parties. For example, the 2010 ASEAN-China Air Transport Agreement was concluded in 2013 amid ASAM’s implementation. This was also further evidence of ASEAN lacking a clear and united strategic direction (Dy, 2014).

Lee (2019) is more optimistic when it comes to ASEAN’s engagement with third parties, describing ASEAN’s ‘open skies’ agreement with China as ‘remarkable’ (p. 192); although, he agrees with Tan (2017) that there is a deep aero-political imbalance in the agreement. According to Tan (2012), the agreement provides the Chinese carriers with a greater advantage in that they are able to connect any point in China with any point in ASEAN. Conversely, the ASEAN carriers can only connect certain points in their home states with a few destinations in China. This asymmetry will prove disadvantageous to the ASEAN carriers in the long run (Tan, 2012). This situation parallels the asymmetrical realities of the world’s largest open skies agreement to date signed in 2007 between the EU and US. Other scholars have also described the agreement as “more of a diplomatic, outward-facing example of compromise aeropolitics” (Fox and Ismail, 2017, p. 40); with “significant unbalance in terms of number of offered seats, available routes, and network development” (Laplace, Lenoir and Roucolle, 2019, p. 672). More importantly, it “demonstrates confusion or lack of clarity with respect to the direction that ASEAN wants to take in its air transport policy” and this might compromise the completion of ASAM (Dy, 2014, p. 18). These arguments dovetail well with Tan’s (2012) question as to why ASEAN is “placing the cart before the horse” by having ‘open skies’ agreements with third parties without fully liberalising its internal connectivity first? (p. 35).

### *3.3. Aeropolitics and geographical imbalances*

Tan (2017) later explained that the decision to pursue an agreement with China was via a joint lobbying effort from Singapore and Malaysia with the backing of the ASEAN Secretariat; both countries have well established flag carriers. The justification was to then kick-start the intra-ASEAN liberalisation movement. During the ratification of ASAM, this idea was not taken up by other member states, most of which were more protective of their own domestic aviation markets, especially Indonesia and the Philippines. In fact, this in turn led to the current “political imbalance

between ASEAN and China” according to Tan (2017, p. 30). Tan (2017) further suggested that this imbalance should be addressed via commercial diplomacy, although he did not elaborate on this argument. This helps to demonstrate how the real hurdles to the region’s closer integration are directly connected to aeropolitics and are yet to be extensively unpacked and more clearly understood.

In this context, each ASEAN member state has approached the Plan of Action differently. A few member states concluded multilateral agreements amongst themselves in order to relax market access restrictions without waiting for other members states to follow suit (Jordan, 2016; Lee, 2015; Ridha Aditya Nugraha, 2020). For example, Brunei, Singapore, and Thailand adopted limited agreements among themselves in 2004, a long way ahead of the official timeline (Tan, 2010). Meanwhile, Indonesia and Laos only signed their multilateral agreement in 2016 – one year after the official deadline expired (Walulik, 2016).

One straightforward explanation for the protectionist stance adopted by Indonesia and the Philippines is the geographical imbalances in the number of entry points that both must offer to non-national airlines after ratification (Lee, 2015; Saraswati and Hanaoka, 2013). While both countries have considerable domestic aviation markets, their airlines are not as competitive as those in Singapore and Malaysia.

### *3.4. Nationalistic sentiments and interests*

Aside from an economic perspective, and even though it is not exclusive to ASEAN, several studies have indicated that a reluctance to further liberalise air markets beyond the fifth freedom of air traffic rights (which could see simultaneous development of an effective ASEAN carrier identity), is rooted in the desire to protect the respective national carriers, which are seen as being of strategic national interest (Gootiiz and Mattoo, 2015; Ridha Aditya Nugraha, 2020; Tan, 2013). Many ASEAN states are also fuelled “by strong post-colonial nationalistic sentiments” (Fox and Ismail, 2017, p. 17).

These arguments explain why ASEAN member states adopt strong protectionism policies, particularly through strict ownership and control policies, and also by bailing out their unprofitable national carriers, such as in the cases of Malaysian Airlines System (MAS), Garuda Indonesia and Thai Airways – all in the name of ‘the national interest’. ASEAN member states, especially those with significant domestic air markets, are also protecting themselves by limiting airport access to foreign airlines. For instance, in 2005 Indonesia prohibited new low-cost airlines from operating into four of its major cities, namely Jakarta, Surabaya, Denpasar and Medan (Saraswati and Hanaoka, 2013).

### *3.5. Domestic politics*

A grasp of the domestic politics in each ASEAN member country is important to better understand the obstacles to ASAM implementation. Permana, Hoen and Holzhacker (2020) carried out a study in Indonesia which sought to unravel “the domestic power relations” between the state and airline companies, which is pivotal in determining the success or failure of ASAM (p. 45). However, the roles of airline companies and the airline associations, in a politico-economic context related to ASAM, have yet to be studied. This omission to date has been highlighted by a few scholars (Hanaoka et al., 2014; Permana, Hoen and Holzhacker, 2020; Saraswati and Hanaoka, 2013).

In the case of Indonesia, Tan (2013) believes it would be inaccurate to assume that efforts to liberalize the air transport industry are resisted by all the major stakeholders in Indonesia as the aero-political landscape in Indonesia is highly complex. This invariably leads to the question: does the same aeropolitics occur in other ASEAN member states? And if so, to what extent does this influence the wider aviation integration initiative?

### *3.6. Infrastructure constraints*

Inadequate airport infrastructure is another core factor thwarting the liberalisation process in ASEAN. It affects the ability of air carriers to make the most out of ASAM (Gootiiz and Mattoo, 2015; Lee, 2019; Saraswati and Hanaoka, 2013). Pointedly, Soekarno-Hatta Airport in Jakarta, Indonesia, Ninoy Aquino Airport in Manila, Philippines, and Suvarnabhumi Airport in Bangkok, Thailand all exceeded their maximum capacity prior to the COVID-19 pandemic (Tan, 2014b). This is in large part due to ASEAN experiencing an immense social transformation with a growing middle class and its associated higher purchasing power, including propensity to fly (Hanaoka et al., 2014; Saraswati and Hanaoka, 2013). And yet, as observed by Tan (2014b), ASEAN governments have not made adequate policy changes to accommodate the demand for air travel in the region. This helps to reveal

more obviously that public transport infrastructure is not only determined by economic factors, but political calculations as well.

### 3.7. *The geopolitics/aeropolitics literature gap on ASAM*

The literature on ASAM acknowledges the role played by aeropolitics in explaining regional integration and liberalisation of air transport in ASEAN (Lee, 2019; Permana, Hoen and Holzhaecker, 2020; Saraswati and Hanaoka, 2013; Tan, 2006, 2010, 2013). However, most of the literature does not give sufficient attention to the factors above, and there is no comprehensive study of the effect of geopolitics on the ASEAN aviation market, with the exception of Permana et al. (2020) who investigated the political economy of ASAM, but limited this to Indonesia. In general, almost all literature on ASAM have focused on regulatory and economic perspectives. Thus, there is an opportunity to explore a broader set of perspectives to improve our understanding of airline market liberalisation in ASEAN, especially in the context of geopolitics and its related field aeropolitics.

## 4. Research design and proposed approach

The doctoral research study which supports this paper is based on a mixed-method in-depth case study of ASAM from a predominately geopolitical vantagepoint. An online expert survey sequentially followed by semi-structured in-depth expert interviews are planned as the main methods of data collection. Experts will be directly contacted via purposeful sampling across industry, government, regulatory bodies, and academia. A variety of statistical tools will be employed to analyse the survey data, while thematic data analysis will be utilised for the in-depth expert interviews. Salient insights typically emerge from expert interview data, and these will be categorised under either key themes or sub-themes and linked back to the research questions, a practice well supported in air transport research (Ellis, 2020). Air transport research is beginning to incorporate perspectives, concepts and theories from the field of international relations; however, there remains wide scope for more (Havel & Sanchez, 2014; Kobierecki, 2020). The proposed research here is intended to merge key international relations considerations across ASAM, together with core geographical realities, by adopting geopolitics as the investigative lens and “crossing over into the real geopolitical world” that significantly shapes and influences global aviation (Bisignani, 2013, p. 86).

These data collection and analysis methods represent tried and tested ways to harness and collate high levels of expertise. At the current stage of the study, the key scholarly literature identifies three levels of geopolitics and aeropolitics in ASEAN which will be developed into three levels of subsequent analysis. Details of these levels are in Section 5 of this paper. In developing this analysis, the study will carefully observe and consider key contributing factors and forces that are likely to have an impact on the geopolitics and aeropolitics of the region. For example, given the ongoing global COVID-19 pandemic, where a number of ASEAN member states are struggling to contain a third wave of the virus – with Indonesia now becoming the new epicentre of the pandemic in Asia – this continues to have direct implications for air transport industries in ASEAN, at least in the near future (ICAO, 2021; Smith, 2021). At the same time, tensions in the South China Sea are rising with the recent UK and US deployment of warships (The Diplomat, 2021a). Japan is now taking a more active and stronger role in this region, including by having its first ever joint military exercise with the Philippines. The two countries share mutual concerns about China’s growing maritime assertiveness in the region (The Diplomat, 2021b). Tensions with China have significant direct influence on the geopolitical dynamics of ASEAN and the wider Asian region (Asia House, 2019), and this invariably will have knock-on effects for aviation.

## 5. ASEAN: Three levels of geopolitics/aeropolitics

Based on the key literature, three levels of geopolitics/aeropolitics can be observed in ASEAN. These are:

### 5.1. *Intra-ASEAN politics*

Firstly, intra-ASEAN geopolitics revolve around the ‘aeropolitics imbalance’ among ASEAN member states and go beyond the respective domestic aviation market size, and airport facilities as shown in Table 2. All member states have imposed a limit on the access of other ASEAN carriers in selected airports to protect their national carriers’

operations – except Brunei and Singapore as both only have one international airport (Alan Tan, 2013; Ridha Aditya Nugraha, 2020; Titik and Findlay, 2017). Indonesia for example, as the biggest aviation market in ASEAN, proposed only five points for an open-skies policy – the major cities of Jakarta, Surabaya, Medan, Makassar, and Bali (Tan, 2013). This is because of the ‘systemic imbalance’ in the ASEAN aviation market, where although some member states have bigger air markets, they also have relatively small airlines at present (Tan, 2013).

Table 2: General information on the air transport sector in ASEAN by Member State 2019 (Source: Compiled by authors using data from ASEAN Statistics Data Portal, 2021; ICAO 2016)

ASEAN Member State	Number of state-owned airlines	Number of international airports	Number of domestic airports	Domestic air passenger traffic (000')	International air passenger traffic (000')
Brunei Darussalam	1	1	0	0	1 845.70
Cambodia	2	3	5	699	10 326.00
Indonesia	4	34	263	79 466	37 278.00
Lao PDR	1	4	9	1 156	2 312.69
Malaysia	2	6	35	55 522	53 840.66
Myanmar	4	3	31	2 981	5 538.68
Philippines	2	11	76	59 281	29 363.01
Singapore	7	2	0	0	67 601.00
Thailand	4	7	29	72 239	81 427.64
Viet Nam	4	9	13	37 453	41 747.00

Most of the designated airports in this agreement avoid the main cities (Gootiiz and Mattoo, 2015; Tan, 2013), and instead of liberalising ASEAN as a single region, the market access relaxations under MAAS are implemented within and between sub-regions of ASEAN which is inconsistent with the overall integration objective of ASAM (Tan, 2013). While this approach can be understood as part of a gradual strategy by ASEAN, it also demonstrates the geopolitical imbalances in the region and across sub-regions.

## 5.2. Inter-ASEAN geopolitics

Secondly, a host of geopolitical issues are brewing within the surrounding ASEAN region more widely, particularly in relations with China, the US, the EU, and others. It is clear from recent statistics that airlines in both Malaysia and Singapore have benefited from their agreements with China (Liu and Oum, 2018). However, adopting a geopolitical perspective on these relationships yields a more nuanced understanding of the strong rejection by both the Philippines and Indonesia of more liberalised regional air access, especially in view of the critical relationship these two member states have with China.

## 5.3. Domestic aeropolitics

Thirdly, the domestic politics in ASEAN member states play crucial roles in shaping the aviation industry in each and between all, including the possibility of regime/government change and the role of non-state actors. To quote Permana et. al (2020); “a number of studies have focussed on measuring the economic impact of the Open Skies Policy but left the domestic interplay of resistance empirically unanswered” (p. 45). Another study on the failure of the ASEAN Economic Community suggested that the gap between rhetoric and reality on the initiative, lies squarely in the “domestic political economy and social conflict” of ASEAN states (Jones, 2016, p. 649). Domestic politics are important to better understand the broader regional aviation integration goals as each individual member state in ASEAN has a plethora of domestic pressures and unique circumstances to contend with.

## 6. Conclusion

Geopolitics play a central role in better understanding why the ten members of ASEAN have struggled to date to

achieve their stated goal of an ASEAN single aviation market (ASAM). Internal domestic politics, intra-regional differences and wider regional realities all intersect to generate significant obstacles to achieving an ASAM. Despite a myriad of key challenges and obstacles, the fact that ASEAN remains committed to a single aviation market does not then logically follow that this aspiration is unlikely to ever become a tangible reality. Missed targets, ongoing regional divisions and unstable domestic political environments did not represent insurmountable obstacles to closer cooperation, nor to eventually some degree of meaningful regional aviation integration. However, what they do suggest is that ASEAN's journey to an ASAM will not be a mirror image of Europe, but rather more reflective of the often cited 'ASEAN way'.

What is also clear is that to develop a more holistic and insightful picture of progress toward an ASAM, academic research needs to expand its focus beyond economics to include other important areas such as politics, geography and cultural considerations. Therefore, the research outlined in this paper seeks to investigate the varied political geographies of ASEAN – specifically, the geopolitics of ASAM – to discover and explore the core contributing factors holding ASEAN back from its stated goals in this regard. This research wants to know why ASEAN's aspirations for a single air market have not yet translated into reality. It is simply not enough to adopt one of two polar opposite views on the topic; that is, either the aspiration is unrealistic and will never happen, or a regional single aviation market is almost a reality, it just needs some more time to become fully operational. Neither standpoint delineates a way forward, but rather entrenches opinions into opposing camps. Understanding the obstacles and challenges to an ASAM, while also acknowledging the opportunities and benefits, are required if aspirations are to become realities. This greater understanding is only possible when geopolitics is given a commensurate place alongside economics when conducting research on the region and aviation integration.

### *6.1. Limitations of the research*

Geopolitics is very dynamic and can change dramatically and quickly. Having said this, the long arc of history does indicate that ASEAN will remain steadfast in its aim to achieve an ASAM into the foreseeable future. With this in mind, this journey is unlikely to be smooth or linear, and so research such as this doctoral study run the considerable risk of getting ahead of both the cart and the horse to build on Tan's (2012) analogy. The winds of political change can act to dramatically alter matters, although this is equally true in terms of being a catalyst to increase the pace of progress toward an ASAM, as it is in building further obstacles to advancement.

### *6.2. Further research*

Despite the growing importance and scale of international air transport, its significance in international relations, specifically its direct links to geopolitics, remain rather neglected as a subject of study (Ellis, 2018). Most of the research on core issues related to regionalism and air transport has been conducted by scholars representing fields other than politics or international relations, particularly tourism, transport, or military history (Kobierecki, 2020). Thus, there are considerable areas for further research. For example, a comparative analysis between two or more regional air markets may help to develop a better understanding on how geopolitics impacts and shapes the liberalisation and integration processes. In addition, individual case studies investigating ASEAN member states and their air transport policies and practices would help to elevate a number of smaller bloc members who are regularly overlooked in scholarly research.

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